

Job Aid: Create Scheduled Offering

PBL Course: Create Scheduled Offerings

Scheduling Management Lab 1: Using the Scheduling Quick Link

Scheduling Management Lab 2: Assigning Resources to Segments

Scheduling Management Lab 4: Adding Segments to a Scheduled Offering

Scheduling Management Lab 10: Copy a Scheduled Offering

Description

The purpose of this job aid is to guide administrators through the step-by-step process of creating and editing a scheduled offering. Related terminology is provided.

Tasks

- Create Scheduled Offering
- Add Additional Segments
- Add Additional Resources
- Copy Scheduled Offering
- Edit Scheduled Offering Notifications

Terminology:

Scheduled Offering: A scheduled offering is an item or activity scheduled for delivery on a specific date and time.

Segment: Unit of division of an item offering based on duration that facilitates variable resource scheduling.

Task A: Create Scheduled Offering






1 Navigate to **Learning > Scheduled Offerings**.

2 Click the **Add New** link. The Scheduled Offering wizard displays.



The screenshot shows the SATERN LMS interface. The top navigation bar includes 'Administration | Quick Links' and a search bar. The sidebar on the left lists 'Items' and 'Scheduled Offerings'. The main content area is titled 'Scheduled Offerings' and contains a search form. The search form has the following fields and options:

- Case sensitive search: ☐ Yes ☒ No
- Offering Type: ☐ Item offering type ☐ Activity offering type ☒ Both
- Scheduled Offering ID:
- Item/Activity ID:
- Description:
- Start Date After: (MMDD/YYYY)
- Start Date Before: (MMDD/YYYY)
- Status: ☒ Active ☐ Not Active ☐ Both

At the bottom of the search form are buttons for 'Search', 'Save As', and 'Reset'. The 'Add New' link in the top right of the search area is highlighted with a red circle and the number 2.

<p>3</p>	<p>Select the Item type option.</p>	<p>3 1. Select a Type</p> <p><input checked="" type="radio"/> Item <input type="radio"/> Schedule Block</p>																																										
<p>4</p> <p>5</p> <p>6</p>	<p>Use the search icon () to search for and select an item (by default the Item Type and Item Title fields will be populated once an item is selected).</p> <p>Enter a description of the scheduled offering.</p> <p>Specify the appropriate Domain and Facility.</p>	<p>2. Identify the Scheduled Offering</p> <p>* Item Type: 4 COURSE</p> <p>* Item ID: 4 ADVSTATS201</p> <p>Title: Advanced Business Statistics</p> <p>Description: 5 One day course on business statistics</p> <p>* Domain: 6 CORP-HR</p> <p>Facility: 6 DC (Plateau Systems HQ)</p>																																										
	<p>View the calendar. The facility's holidays and non-working days are blocked out.</p>	<p>Calendar Preview</p> <p><< ≤ May 2006 ≥ >></p> <table border="1"> <thead> <tr> <th>Sunday</th> <th>Monday</th> <th>Tuesday</th> <th>Wednesday</th> <th>Thursday</th> <th>Friday</th> <th>Saturday</th> </tr> </thead> <tbody> <tr> <td>30</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> </tr> <tr> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> </tr> <tr> <td>14</td> <td>15</td> <td>16</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> </tr> <tr> <td>21</td> <td>22</td> <td>23</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> </tr> <tr> <td>28</td> <td>29</td> <td>30</td> <td>31</td> <td>1</td> <td>2</td> <td>3</td> </tr> </tbody> </table>	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday																																						
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21	22	23	24	25	26	27																																						
28	29	30	31	1	2	3																																						
<p>7</p> <p>8</p> <p>9</p>	<p>Click the calendar icon () to select a start date.</p> <p>Enter a start time.</p> <p>Change the time zone of delivery, if necessary.</p>	<p>3. Set Up the Segment 7</p> <p>* Start Date: (MMM/d/yyyy)  MAY/29/2006</p> <p>* Start Time: (hh:mm aaa) 8:00 am 8</p> <p>* Time Zone:  America/New_Yo 9</p> <p>Note: Enter the start time in the format displayed (i.e., hh:mm AM/PM) on your specific system.</p>																																										
	<p>Select Resources, including instructor, location, and equipment.</p> <p>Note: If the scheduled offering is delivered via VLS, select the VLS server and enter the password.</p>	<p>4. Select Resources</p> <p>Primary Instructor: JEDADAMS</p> <p>Primary Location:  Conference Room A</p> <p>Equipment: LAP1 (Laptop PC)</p> <p>VLS Server: None</p> <p>Password:</p>																																										







View the calendar again. The facility's holidays and non-working days are blocked out.



Note: Resource icons () illustrate other dates when resources are already allocated. Conflicts are denoted with a Conflict icon ().


10 Click **Next**.

Calendar Preview

<< ≤ May 2006 ≥ >> **10** Next

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	1 	2	3	4	5 	6
7	8	9	10	11	12	13
14	15 	16	17 	18	19	20
21	22 	23	24	25	26	27
28	29	30	31 	1	2	3

Legend:  - Schedule Dates  - Conflict

11 Add the scheduled offering to a related catalog by clicking the **search icon** () to search and select a catalog.

If the item resides in a catalog, it will already be listed.

12 Click **Next**.

Add New Scheduled Offering Help


Initial Details > **Publish** > Confirm **12**

Previous Next

Select the **Catalogs** that should display the **Scheduled Offering** to users. Catalogs are used to determine which users see what scheduled offering. You will select only from the list of catalogs that contain the item that you are scheduling.

Title: Behavior: Putting Your Best Foot Forward
Delivery Dates: 8/31/2007 09:00 AM - 8/31/2007 03:00 PM

Related Catalog

 Add

List of Selected Catalogs Remove All

Catalog ID	Catalog Description	
KSO-GEN	KSO General	Remove
PUBLIC		Remove
SS	SkillSoft Course Catalog	Remove

Note: If enabling self registration, the scheduled offering must reside in a catalog the intended users can view.

Confirm results.

13 Click **Submit**.

Previous Submit **13**

Review the Summary of the scheduled offering you are adding to the system. If you are satisfied with data that you have entered, click **Submit** to add the **Scheduled Offering** to system.

Title: Advanced Business Statistics
Description: One day course on business statistics
Identifier: COURSE **ADVSTATS201** 1202505420000

Schedule Segments Information:

May/29/2006 08:00 AM May/29/2006 04:00 PM

Resources Used:

Instructor: JEDADAMS
Location: Conference Room A
Equipment: LAP1

Publishing Information

Publish to 1 Catalog(s)

<p>14 View the scheduled offering record.</p>	<div> <div>Scheduled Offerings Search Add New Help </div> <div>> Search > Search Results > Edit Summary 14</div> <div> Scheduled Offering ID: 4446 Item: COURSE ADVSTATS201 (Rev May/9/2006 12:07 PM America/New York) Title: Advanced Business Statistics </div> <div> <div>VLS Settings Standard Options</div> <div> <div>Notifications</div> <div>Cost Calculation</div> <div>Cost Summary</div> <div>Pricing</div> <div>Catalog</div> <div>Chargeback</div> </div> <div> <div>Summary</div> <div>Segments</div> <div>Registration</div> <div>Contacts</div> <div>Materials</div> <div>Custom Fields</div> </div> </div> <div>Edit the Scheduled Offering</div> <div>* = Required Fields</div> <div> <div>Apply Changes</div> <div>Reset</div> <div>Copy Scheduled Offering...</div> <div>Delete</div> </div> </div>
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Task B: Add Additional Segments

<p>1 Click the scheduled offering Segments tab.</p>	<div> <div>Standard Options</div> <div> <div>Notifications</div> <div>1 Cost Calculation</div> <div>Cost Summary</div> <div>Pricing</div> <div>Catalog</div> <div>Chargeback</div> </div> <div> <div>Summary</div> <div>Segments</div> <div>Registration</div> <div>Contacts</div> <div>Materials</div> <div>Custom Fields</div> </div> </div>												
<p>2 Scroll down to view the existing segment(s). 2 Choose a segment to copy and click Copy Daily Segments.</p>	<div> <div>Update the Segments for the Scheduled Offering</div> <div> <div>Apply Changes</div> <div>Reset</div> </div> <div>Total Hours: 8.00</div> <div> <div>Segments</div> <div> <div>Segment 1</div> <div> <div>* Start Date (MM/Md/yyyy) May/29/2006</div> <div>* End Date (MM/Md/yyyy) May/29/2006</div> <div>* Start Time (hh:mm aaa) 09:00 AM</div> <div>* End Time (hh:mm aaa) 05:00 PM</div> <div>* Time Zone EST (Eastern Standard Time)</div> <div>Primary Instructor: JEDADAMS</div> <div>Primary Location: KSO-HQ-Classroo</div> <div>Segment Description: Default segment</div> </div> <div> <div>Edit Resources</div> <div>Copy Resources to All</div> <div>2 Copy Daily Segments</div> </div> </div> <div> <input checked="" type="checkbox"/> Send Notification <input checked="" type="checkbox"/> Check Conflicts </div> <div> <div>Apply Changes</div> <div>Reset</div> </div> </div> </div>												
<p>3 Enter a number of times to copy.</p> <p>4 Select the Check Conflicts and/or Send Notification checkboxes.</p> <p>5 Click Copy.</p>	<div> <div>Segments for the Selected Date</div> <table border="1"> <thead> <tr> <th>Seg#</th> <th>Segment</th> <th>Start Date/Time</th> <th>End Date/Time</th> <th>Location</th> <th>Instructor</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Default segment</td> <td>May/29/2006 09:00 AM EST</td> <td>May/29/2006 05:00 PM EST</td> <td>Classroom 001 KSO Headquarters</td> <td>Adams, Jeffrey D</td> </tr> </tbody> </table> <div> <div>* Number of Times to Copy: 3</div> <div>(1,000.00)</div> </div> <div> <div>Check Conflicts: <input checked="" type="checkbox"/></div> <div>Send Notification: <input checked="" type="checkbox"/></div> <div> <div>4</div> <div>5</div> </div> <div> <div>Copy</div> <div>Reset</div> </div> </div> </div>	Seg#	Segment	Start Date/Time	End Date/Time	Location	Instructor	1	Default segment	May/29/2006 09:00 AM EST	May/29/2006 05:00 PM EST	Classroom 001 KSO Headquarters	Adams, Jeffrey D
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1	Default segment	May/29/2006 09:00 AM EST	May/29/2006 05:00 PM EST	Classroom 001 KSO Headquarters	Adams, Jeffrey D								

Task C: Add Additional Resources

- 1 For the segment you wish to add resources, click **Edit Resources**.

Segments

Segment 1

* Start Date (MMM/d/yyyy) : May/29/2006 * End Date (MMM/d/yyyy) : May/29/2006

* Start Time (hh:mm aaa) : 08:00 AM * End Time (hh:mm aaa) : 04:00 PM

* Time Zone : America/New_Yo

Primary Instructor: JEDADAMS Primary Location: Conference Room

Segment Description: Default segment

VLS Server: None Password:

Edit Resources Copy Resources to All Copy Daily Segments Delete

- 2 Select the tab corresponding to the type of resource you wish to add.

- 3 Click the **add one or more from list** link to search for and add additional resources.

Instructors **Locations** **Equipment** Materials Cust. Resources

Add Equipment to the Scheduled Offering Segment

* = Required Fields

Enter Equipment ID or [add one or more from list](#)

Equipment ID:

☒ Check Conflicts **Add** **Reset**

- 4 When finished adding resources, click **Return to Scheduled Offering**.

Note: Click **Copy Resources to All** at the segment level to copy the new resources to all segments of the scheduled offering.

Return to Scheduled Offering

Instructors **Locations** **Equipment** Materials Cust. Resources

Add Equipment to the Scheduled Offering Segment

* = Required Fields

Enter Equipment ID or [add one or more from list](#)

Equipment ID:

☒ Check Conflicts **Add** **Reset**

Edit the Equipment for the Scheduled Offering Segment

Check Conflicts: ☒ **Apply Changes** **Reset**

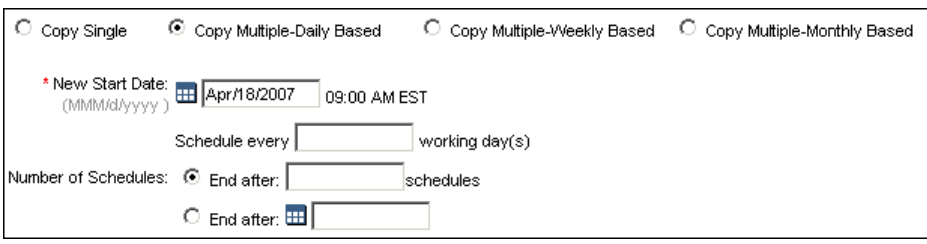
[Select All](#) / [Deselect All](#)

Equipment ID Name (Type)	* Start Date (MMM/d/yyyy)	* Start Time (hh:mm aaa)	* End Date (MMM/d/yyyy)	* End Time (hh:mm aaa)	Dur.	Remove
123	May/29/2006	08:00 AM	May/29/2006	04:00 PM	8.00	<input type="checkbox"/>
Projector (OVER)						
LAP1	May/29/2006	08:00 AM	May/29/2006	04:00 PM	8.00	<input type="checkbox"/>
Laptop PC (LAP)						

[Select All](#) / [Deselect All](#)

Check Conflicts: ☒ **Apply Changes** **Reset**

Task D: Copy Scheduled Offering

<p>1</p> <p>2</p>	<p>Select the Summary tab of the scheduled offering.</p> <p>Click Copy Scheduled Offering....</p>	
<p>3</p>	<p>Set copy preferences by checking associated boxes.</p> <p><i>Note: Click Help for additional information on each option.</i></p>	
<p>4</p> <p>5</p>	<p>Select a copy frequency.</p> <p>Select the first scheduled offering copy start date.</p>	 <p><i>Note: If you choose an option other than Copy Single, enter a scheduling frequency as seen below. This determines how many new offerings are created and how frequently they are scheduled.</i></p> 
<p>6</p> <p>7</p> <p>8</p>	<p>Select the checkboxes for the days on which the new scheduled offering(s) can be scheduled. (Copy Single Only)</p> <p>Select Override adjusted registration cut-off date if desired and choose a new cut-off date and time.</p> <p>Click Next.</p>	

<p>9</p>	<p>Confirm copy results. Click Copy.</p>	<div> <p>Scheduled Offering ID: 4008 Description: ADJ FIRE SAFETY</p> <p>Copy Group Instance: No Copy New Scheduled Offering to the catalog: No Use item default segment day numbers: No Copy to consecutive Days: No</p> <p>New Start Dates: Apr/18/2007 09:00 AM EST</p> <p>Include Registration Cut-off Date: Yes</p> <p>Send Notification: <input checked="" type="checkbox"/> Copy</p> </div>
<p>10</p>	<p>Once the copies are created, you can access them with the links on the final screen.</p>	<div> <p>New Offering IDs and Start Dates: 4009-Apr/18/2007 09:00 AM EST</p> </div>

Task E: Edit Scheduled Offering Notifications

<p>1</p>	<p>Select the Notifications tab of the scheduled offering.</p>	<div> <p>1</p> <p>Standard Options</p> <p>Notifications Cost Calculation Cost Summary Pricing Catalog Chargeback</p> <p>Summary Segments Registration Contacts Materials Custom Fields</p> </div>
<p>2</p> <p>Scroll down to view the notification you wish to edit.</p> <p>Note: You may edit the notifications sent by the following triggers:</p> <ul style="list-style-type: none"> - Offering Cancellation - User Registration - User Withdraw - User Waitlist - User Waitlist Removal - User Pending Status <p>3</p> <p>Click Preview to view the notification.</p>		<div> <p>2</p> <p>Edit the Registration Notification for the Scheduled Offering</p> <p>Preview Apply Changes Reset</p> <p>User: <input type="text" value="<label key='notification.Enrollment.StudentSubject'/'>"/></p> <p>Supervisor: <input type="text" value="<label key='notification.Enrollment.SupervisorSubject'/'>"/></p> <p>Instructor: <input type="text" value="<label key='notification.Enrollment.InstructorSubject'/'>"/></p> <p>Other: <input type="text" value="<label key='notification.Enrollment.OthersSubject'/'>"/></p> <p>Body: <div> <LOOP> <label key='notification.Enrollment.MessageText1'/'><R&O LLUP_MSG> </LOOP> <LOOP> </div></p> <p>3</p> <p>Preview Apply Changes Reset</p> </div>
<p>4</p> <p>In the notification body, you will see syntax tags. These indicate a database value that is included in the emails.</p>		<div> <p>This note confirms your pending registration in the following learning activity:</p> <p><&SCHD-CPNT> 4</p> <p><&SCHD-DESC></p> </div>

<p>5</p>	<p>To modify the body of the notification, locate the body section and add text.</p> <p>You may remove existing labels and tags, or add text around them.</p>	<div data-bbox="553 184 1370 382"> <p>Body:</p> <div> <div>5</div> <div> Please read the entire message below as it contains important details about your registration in training at Plateau. <LOOP> <label key="notification.Enrollment.MessageText1"/><RO </div> </div> </div> <p>Note: Click Help for more information on syntax tags and how to use them in notifications.</p>
<p>6</p>	<p>Click Apply Changes.</p>	
<p>7</p> <p>8</p>	<p>To attach a document to the notification, click Browse to search for and select the document.</p> <p>Click Apply Changes.</p>	<div data-bbox="553 562 1474 753"> <p>Attachment for Registration Notification</p> <p>Current Attachment:</p> <p>New Attachment: <input type="text" value="C:\Scheduling\Notifications\instructions.pdf"/> 7 <input data-bbox="1166 640 1258 672" type="button" value="Browse..."/></p> <p>8 <input type="button" value="Apply Changes"/> <input type="button" value="Reset"/> <input type="button" value="Clear the Attachment"/></p> </div>